Franklin County
Board of Commissioners

# COMMISSIONERS' RESOLUTION MANAGEMENT SYSTEM

# GENERAL USER MANUAL

Commissioners' Resolution Management System

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## INTRODUCTION

The Commissioners' Resolution Management System (CRMS) streamlines the resolution process and provides electronic access to agendas, resolutions, and supporting documentation for agencies and business entities as well as the public. CRMS resolutions are submitted via the County's Intranet Portal, or through a website provided to outside entities such as legal firms or agencies not connected to the County Intranet Portal. Simply logon to CRMS, enter the resolution, attach supporting documentation in PDF format and click Submit. A clerk in the Commissioners' office will then review the resolution and either accept it or send it back. The agenda is published electronically. Once the agenda is published, each resolution and its supporting documentation will be available online via the Commissioners' website and the CRMS application.

### Access to CRMS

There are three ways to access CRMS: Public access from the Commissioners' web page, internal access from the County's Portal application, and access for outside entities such as legal firms from a secured URL.

### Public Access

The Commissioners' web page contains:

Briefing Agenda link - A link to display the most current Briefing Agenda is available on the County Commissioners' website. Links within the Briefing Agenda PDF will display the resolutions on the agenda.

General Session / Special Sessions link - The ability to access General Session Agendas and Special Session Agendas from the Board of Commissioners' Website. Clicking on any of the agendas displayed will activate the link to access the CRMS application, displaying that Agenda in PDF format. Links will be available within the Agenda PDF to display all the resolutions and support documentation for the agenda. The agenda will display the last published version. Resolutions displayed from the agenda will be in their most current state.

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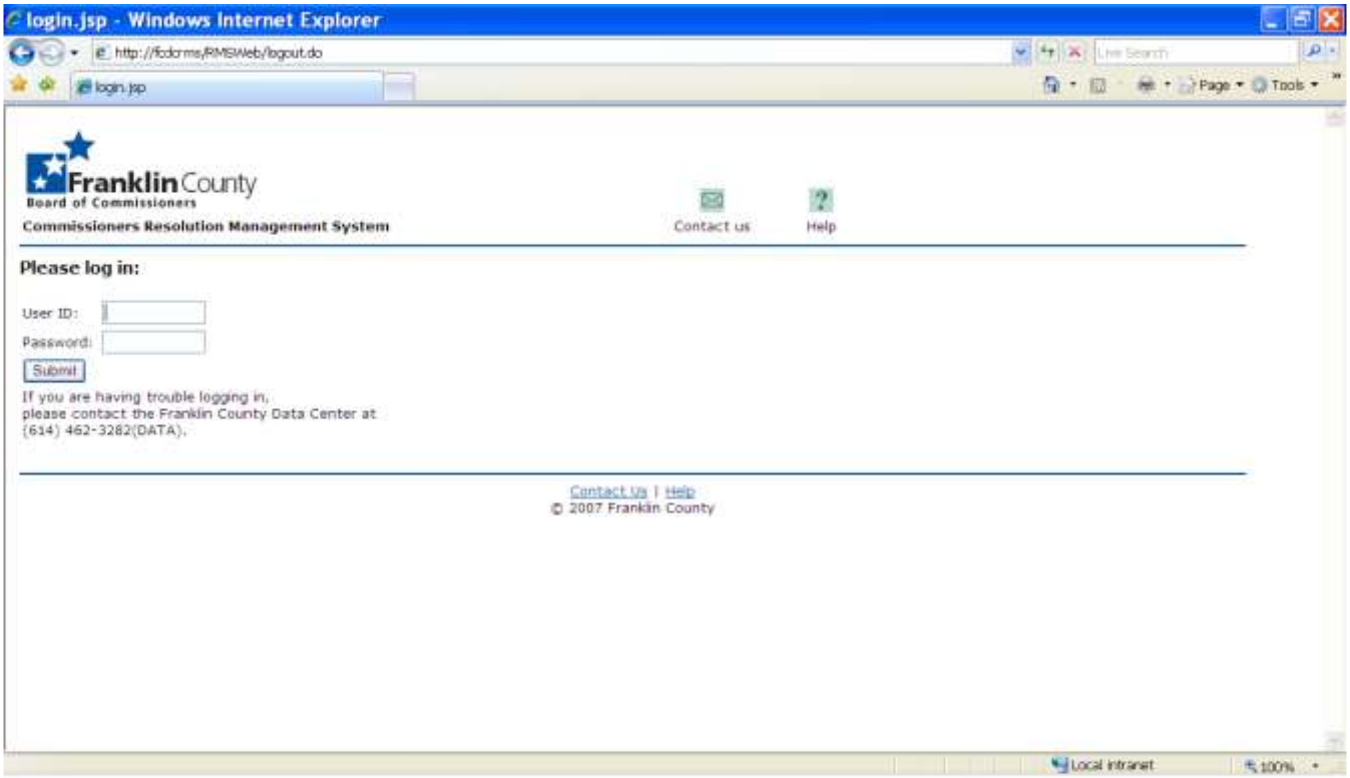
## Franklin County User Login (Internal)


*Internal Login for Franklin County Portal Users*

All users on the Franklin County Data Network can access CRMS from the Portal. If a user has access to the application, CRMS will appear in the Access Granted box on the right of the screen. To start using CRMS, click on “CRMS”.

## Outside Entities Login




*Login for Outside Entities*

Outside entities, will receive a URL once granted access to CRMS that will direct them to the screen above.  They will also receive a Userid and Password. Both the User ID and Password are case sensitive. The user then clicks the Submit button to enter CRMS.

**User ID:** The user ID used to logon to the Franklin County Data Network
**Password:** The password used to logon to the Franklin County Data Network

**Associated Links:**

- **Contact us**– Email addresses for Board of Commissioners Clerk (BOC), Franklin County Data Center Webmaster, and Customer Service (CSC).  An Outlook window will open so the user can type a message to the BOC Clerk, Web team or CSC.
- **Help** – Online CRMS help. The User manuals are available for viewing and printing.

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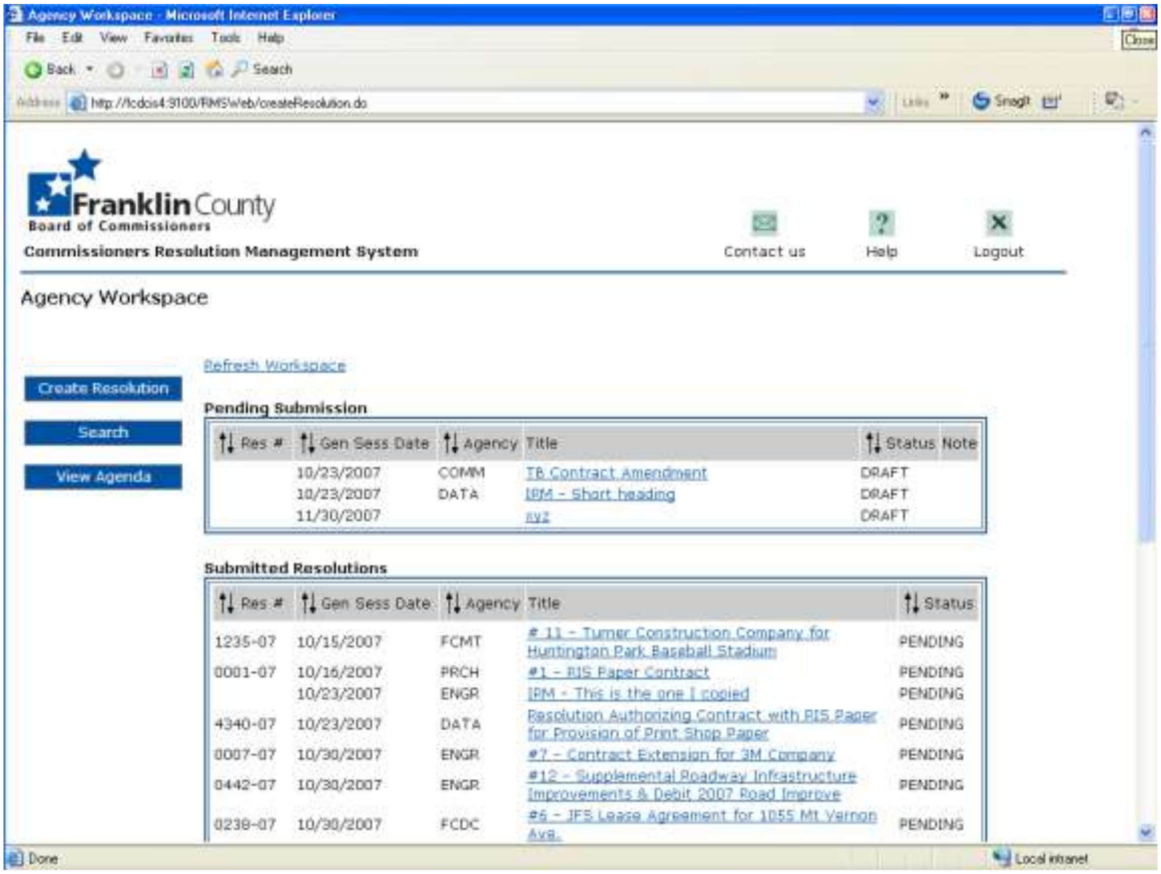
# THE WORKSPACE




*Workspace Screen*

The Workspace is the starting screen for creating, searching, and editing resolutions. A user can determine the status of resolutions submitted for his or her respective agency. Resolutions submitted for other agencies can also be viewed. Resolutions in various stages are shown arranged in “queues”:

- Pending Resolutions Queue - Resolutions that are in draft status, ‘in-progress,’ waiting to be submitted to BOC, or have been returned by the Clerk to the agency. Draft resolutions can be modified. Deletions are not possible once a resolution number has been assigned. To delete a resolution after a resolution number has been assigned, the Clerk must be contacted. This queue also includes:
    - Pulled resolutions that have been returned to the agency.
    - Tabled resolutions that have been returned to the agency and need to be resubmitted with a new General Session date.
    - Resolutions that have been adopted, conditionally, if amended.

- Submitted Resolutions Queue - Resolutions that have been submitted for review and resolutions that have been reviewed and accepted by the Clerk. These resolutions can not be deleted or modified. To delete or modify a resolution in this queue, the Clerk must be contacted by either Email or phone and it will be returned to the Pending Submission queue for maintenance.
- Finalized Resolutions Queue –Resolutions in this queue have been presented at session, acted on and archived. These will stay in this queue for 10 days. They can not be deleted or modified in this queue.

Each column heading with double arrows can be clicked on to sort the resolutions by the information in that column. The Resolution Number column sorts numerically, the General Session Date column sorts chronologically; the remaining text-based columns sort alphabetically. Clicking these headings will also switch the sort from ascending to descending or back again (e.g. a text-based column can be switched from alphabetical order to reverse alphabetical order, and back.). To find a particular resolution or set of resolutions that have been published, use the Search function.

**Resolution: A Definition**
A resolution is a document that presents a proposal before the Board of Commissioners to be reviewed and adopted by Franklin County.

**Comment Icon**
The Clerk will return a resolution to an agency if it is not acceptable for submission, or if the agency or the Commissioners' office requests that it be pulled. The returned resolution will appear in the Pending Submission queue. If a comment from the Clerk exists for a resolution, an envelope icon will be displayed at the far right of the resolution. Clicking the "Comment" icon will display the comment. Comments are used to explain why a resolution was returned and what changes are needed to make it acceptable. A reply can be sent back to the Clerk by entering remarks into the Message box at the bottom of the screen and clicking Post Message. The envelope icon will be 'grayed out' if there are no new messages associated with it.
When a resolution is returned to an agency, CRMS also sends an email to the Submitter of the resolution notifying them that the resolution is back in their workspace.

**Displaying Resolutions**
Resolutions displayed in the Submitted and Finalized Resolution queues may be viewed by clicking the resolution title. Resolutions will display as PDF files.

**Deleting Resolutions**
A resolution can be deleted if it does not have a resolution number, and it is in the Agency Workspace Pending Submission queue. To delete a resolution after its status has been changed from Draft, the Clerk must be contacted. If an agency chooses not to resubmit a Tabled resolution, it cannot be deleted from the Agency Workspace Pending Submission queue. The Clerk must be notified, by either Email or phone.

**Return to Workspace**

Clicking on the “Return to Workspace” button will return the user to the Agency Workspace screen. Any changes made without saving will be lost.

**OPERATIONAL NOTES**

- Resolutions must be submitted by Monday at noon for the following week’s meeting. Contracts must be signed by the vendor and the Prosecutor (if applicable) before they are attached to the resolution. Users are encouraged to submit resolutions as early as possible.

- Resolutions can only be submitted for a date in the future, if a resolution needs to be submitted for the current date, the Clerk should be contacted.

- The Clerk will retain the one original copy of all contracts. If your agency or the vendor requires an original copy remember to submit the proper number. Please do not submit more originals for signatures than you need. Remember to attach a copy of your resolution to the original contracts you manually submit for signature.

- Only items that are in the Pending Submission queue can be modified. After a resolution is accepted, agency-level users cannot make changes unless the resolution is returned with a change request to the Clerk.

- The only resolutions visible in an agency’s workspace are: a) resolutions submitted by the user’s agency for that user’s agency; b) resolutions submitted by the user’s agency on behalf of another agency; and c) resolutions submitted on behalf of the user’s agency by another agency.

- The resolution number appears only when the resolution has been accepted and published on the General Session Agenda or Special Session Agenda.

- To enter information into a field, click inside that field, or use the TAB key to move forward through the fields. Holding down the SHIFT+TAB keys moves the cursor backward through the fields.

- Font size for text must be 10 point minimum, 12 point is the preference. Do not use highlighting or insert pictures.

- Users will automatically be logged out two hours after they last press the ENTER key. This is a necessary security measure. When prompted, simply repeat the login procedure to continue.

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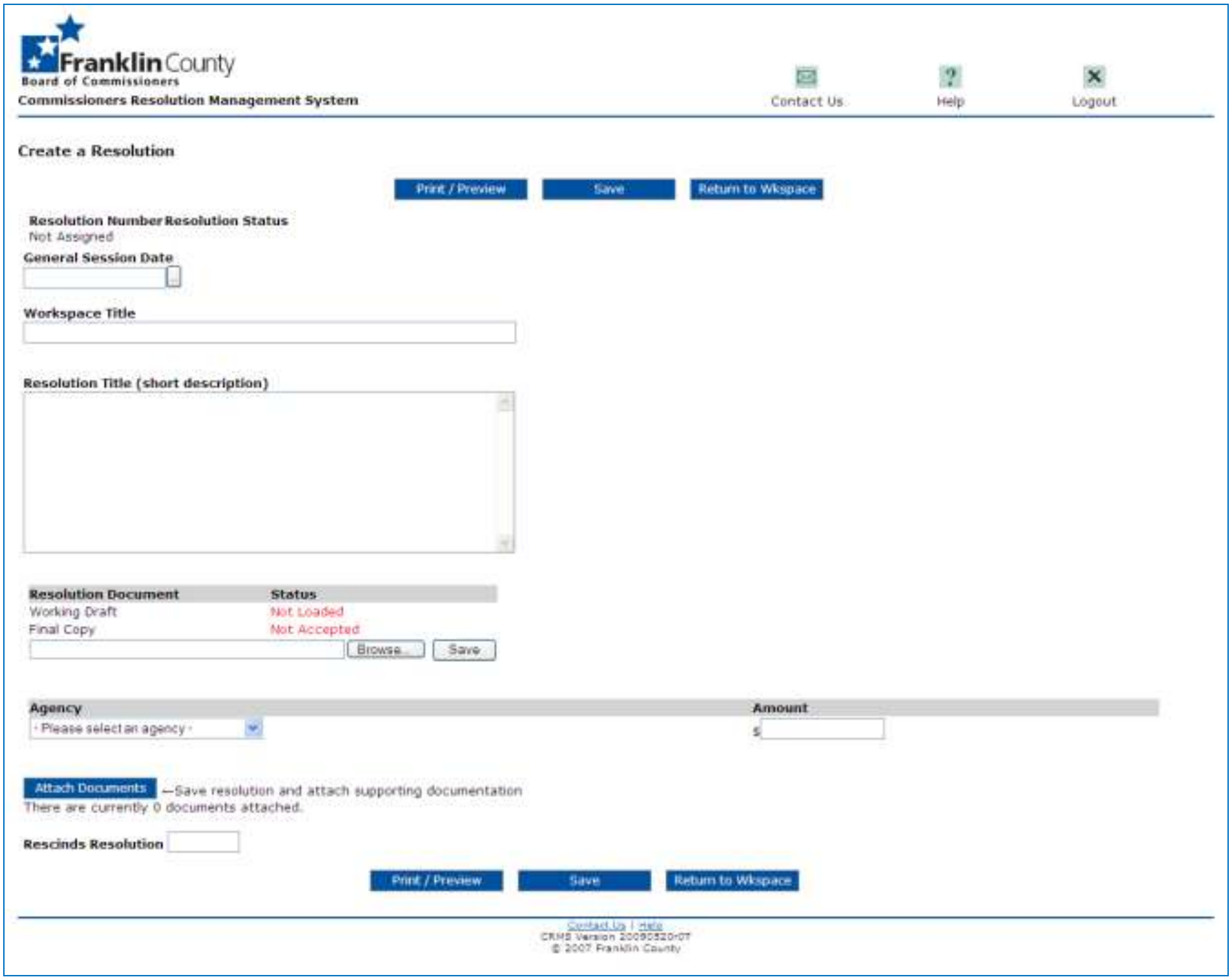
## FIELD DESCRIPTIONS

The fields described in this section appear on the Create a Resolution screen.




*Create a Resolution Screen*

### General Session Date

A General Session Date must either be typed in, or selected by clicking the Calendar Icon to the right of the field. The General Session Date is a mandatory entry prior to saving the resolution and must be a valid date. The session date must be greater than the current date. If a resolution needs to be submitted for the current date, please contact the Clerk.

### Workspace Title

The Workspace Title must be entered for the resolution. This text box allows the user to describe the resolution. This title is used to help identify resolutions in the Agency Workspace and Administrator Workspace, and is used when working with agendas. It will not be printed or displayed on any resolution or agenda.

**Resolution Title**
Enter a title or short description of the resolution. This information is displayed on the agenda; it is the first information block of text shown on the resolution.

- All text should be entered in upper and lowercase only, no upper case only.
- No highlighting or pictures are allowed.
- List all appointments or vendors name(s) within the Title (up to five appointees or vendors). If there are more than five, note *et al.*, and add the additional names in the body of the resolution.
- All resolutions with supporting contracts will contain the vendor names(s) in this title box (for resolution/title heading).

**Amount**
A dollar amount can be keyed in to indicate the transaction amount. Leave blank if there is no dollar amount.

**Resolution Document**
This field is used to load the Microsoft Word document containing the text of the resolution into the application. Its function is similar to attaching a document to an Email.

**Rescinds Resolution**
This field is used to indicate the resolution number that the current resolution is requesting to be rescinded.

**COPYING AND PASTING FROM MICROSOFT WORD**

The copy/paste function from Microsoft Word or Excel is one of the options for inputting the Resolution Title into the text box when creating or editing a resolution. Follow these steps to copy and paste from a Microsoft Word:

1. Open the Word document containing the text to be copy and pasted

2. Highlight the text

3. Press CTRL+C or right-click and select COPY.

4. Go back into the CRMS application and click inside the Resolution Title text box.

5. Right-click and select PASTE; the text will appear in the small box

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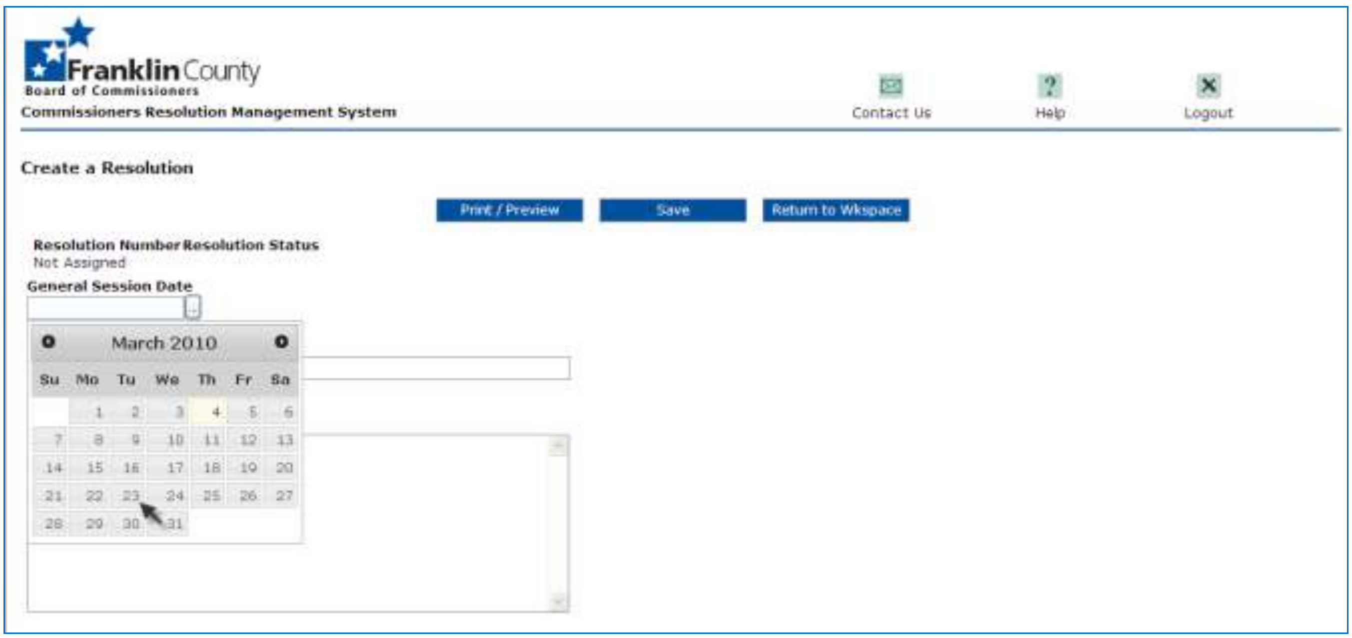
## CREATING A RESOLUTION

Before creating a resolution, the resolution document must be prepared in Microsoft Word. This document will then be loaded into the system so it can be included on an agenda.

1. To get to the Create a Resolution screen, click “Create Resolution” from the Workspace screen.

2. Enter the General Session Date by clicking on the calendar control at the end of the field and clicking on the date to be entered. The arrows and pull-down controls on the calendar can be used to scroll to earlier or later months, however, the current date or a date in the past will not be accepted as a valid date for creating a resolution. The date can also be entered manually by typing it in the following format: MM/DD/YYYY (*e.g.* 01/01/2008).



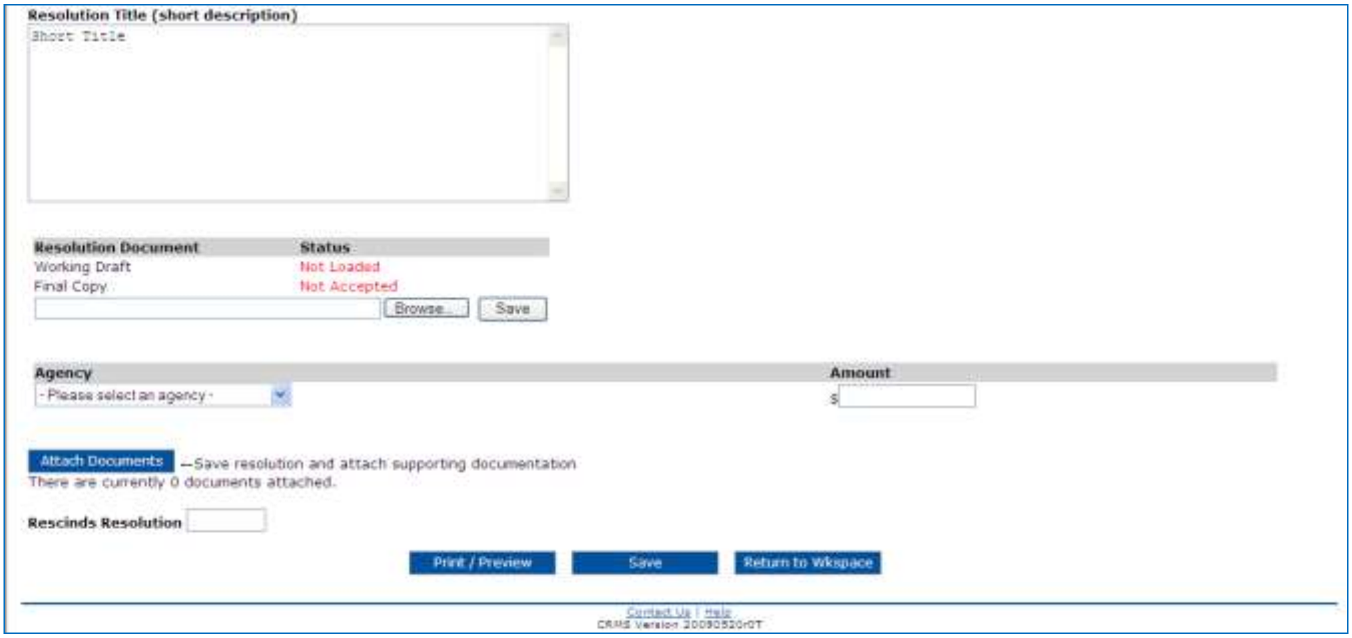

*Entering a Date*

3. Enter a brief description in the Workspace Title field. (This title is only for record keeping purposes and is not a part of the actual resolution or agenda)

4. Enter the short description in the Resolution Title field. To save time, you can copy and paste the Title in from the Word document that is being submitted. Both the Title field in the application and the Title within the actual resolution document should be in mixed case (both upper and lowercase) with it being bolded within the Word document.

5. Click the pull down button at the end of the Agency field and select the agency sponsoring the resolution. This will only display the agency(s) the user has authorization to submit for.

6. Enter the amount requested in the Amount field. Fill in dollars and cents without including a dollar sign (Not a required field)




*Before loading Resolution Document*

7. Click “Browse” to load the resolution document (the Working Draft status should read “Not Loaded” and the Final Copy status should read “Not Accepted” when creating a new resolution)

8. Select the resolution document (the document must be a Word document) and click “Open”; the Browse window closes, and the file name of the resolution document appears in the field

9. Click “Save”. This saves the resolution document to the system. The Working Copy status changes to “Loaded”, and a “Retrieve Document” link is added. The Final Copy status will only change to ‘Accepted’ once the Clerk accepts the resolution.


*After loading Resolution Document*

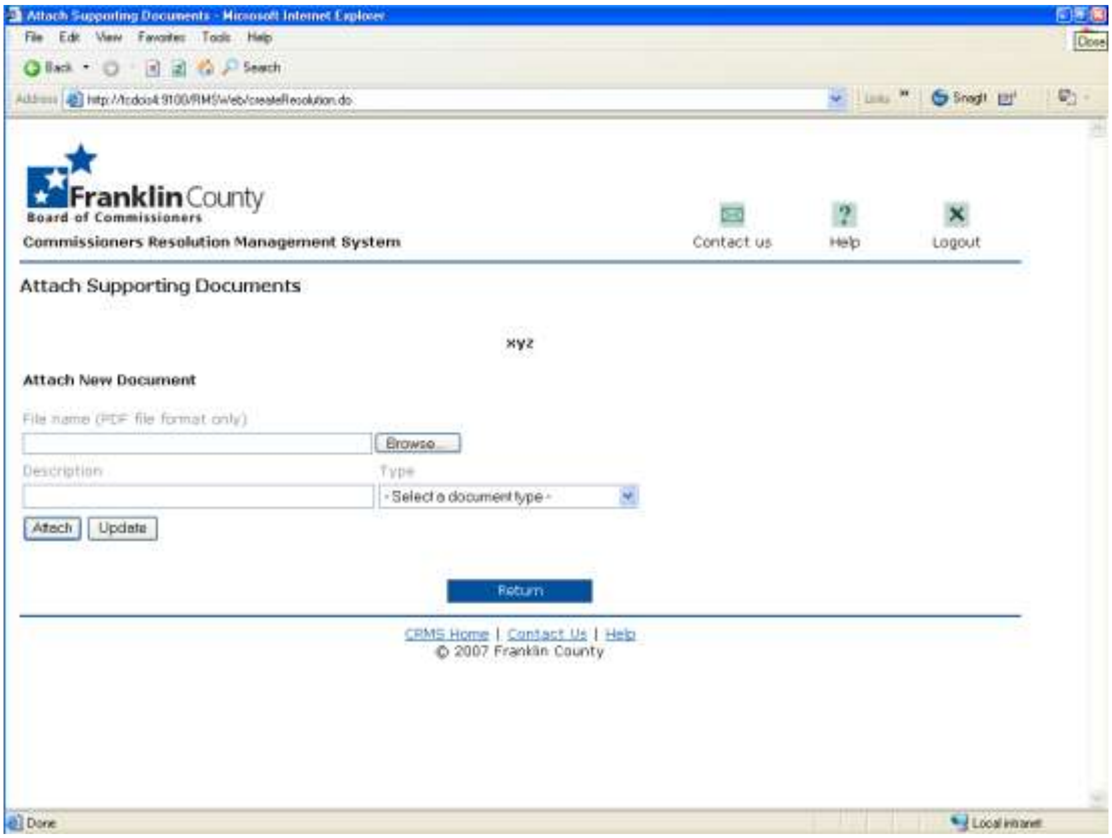
10. Click "Attach Supporting Documentation" to add all the supporting documentation in PDF format (see Attaching Documents – page 12)

11. If the resolution rescinds a previous resolution, enter the number of the resolution that has been rescinded in the Rescinds Resolution field; otherwise, leave this field blank

- Clicking "Print Preview" will bring up the print/preview screen and provide the ability to print the resolution
- Clicking "Save" will save the resolution
- If there are errors in the document, they will be noted at the top of the screen in red. Correct these errors and click "Save" again
- Clicking "Submit" will submit the resolution to the BOC clerk and return the user to the workspace. The resolution can then be viewed in the Submitted Resolutions queue. NOTE: The Submit button should not be clicked until the document has been completed and is ready to be presented to the BOC session. Contact the Clerk if the resolution is submitted in error and needs to be returned back to the Pending Submission queue
- To return to the Agency Workspace click "Return to Workspace".

## ATTACHING DOCUMENTS

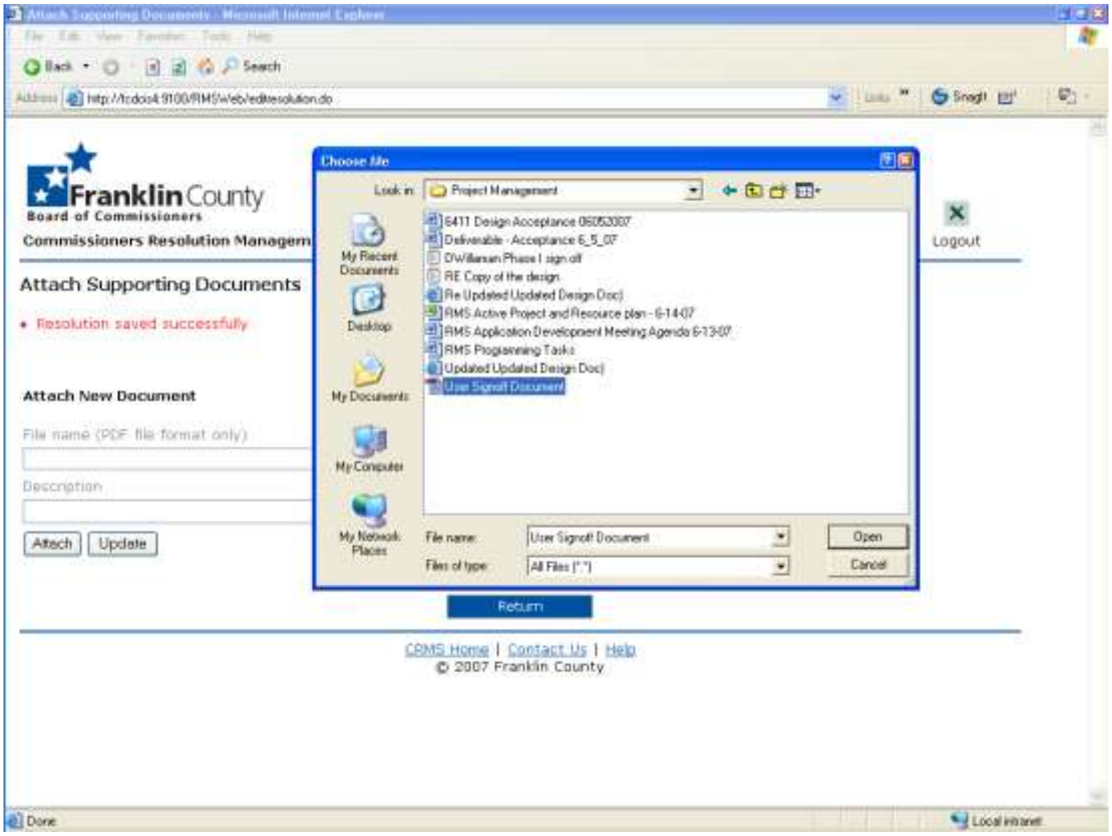
On the Create/Edit Resolution screen, clicking “Attach Documents” will save the resolution and take the user to the Attach Supporting Documents screen. The supporting documents will need to be saved in PDF format prior to this procedure.




*Attach Supporting Documents Screen*

1. Click “Browse” to locate the document to attach. The document must be in PDF format to allow the Agenda Packet to print correctly. Once the document is located, double click to add the document. The document file name will appear in the File Name field. (Note: the system will not allow the same document to be attached twice. To attach an updated version of a file that has already been attached to a resolution, first remove the existing copy and then reattach the update version.)

**Note**: When scanning and saving attachments and signatures are required DO NOT save all the documentation related to a resolution into one PDF file. Separating these documents makes it easier to identify them, because these pages will need to be replaced with signed documentation after the resolution has been approved. Example: do not scan the contract, summary, PO and cover letter into one attachment. Also when saving, name the file something that will help identify the document type easily.




*Selecting the Document to Attach*

2. Enter a short description of the document in the Description field

3. Click the pull down at the end of the Type field and select the document type

4. Click “Attach“; the attachment will appear at the bottom of the screen with an order number on the left, and Edit and Remove buttons on the right

NOTE: The Agency needs to include the Summary Sheet as the first document under Attached Documents. The Signature Page will be attached by the Clerk after the resolution has been voted on.

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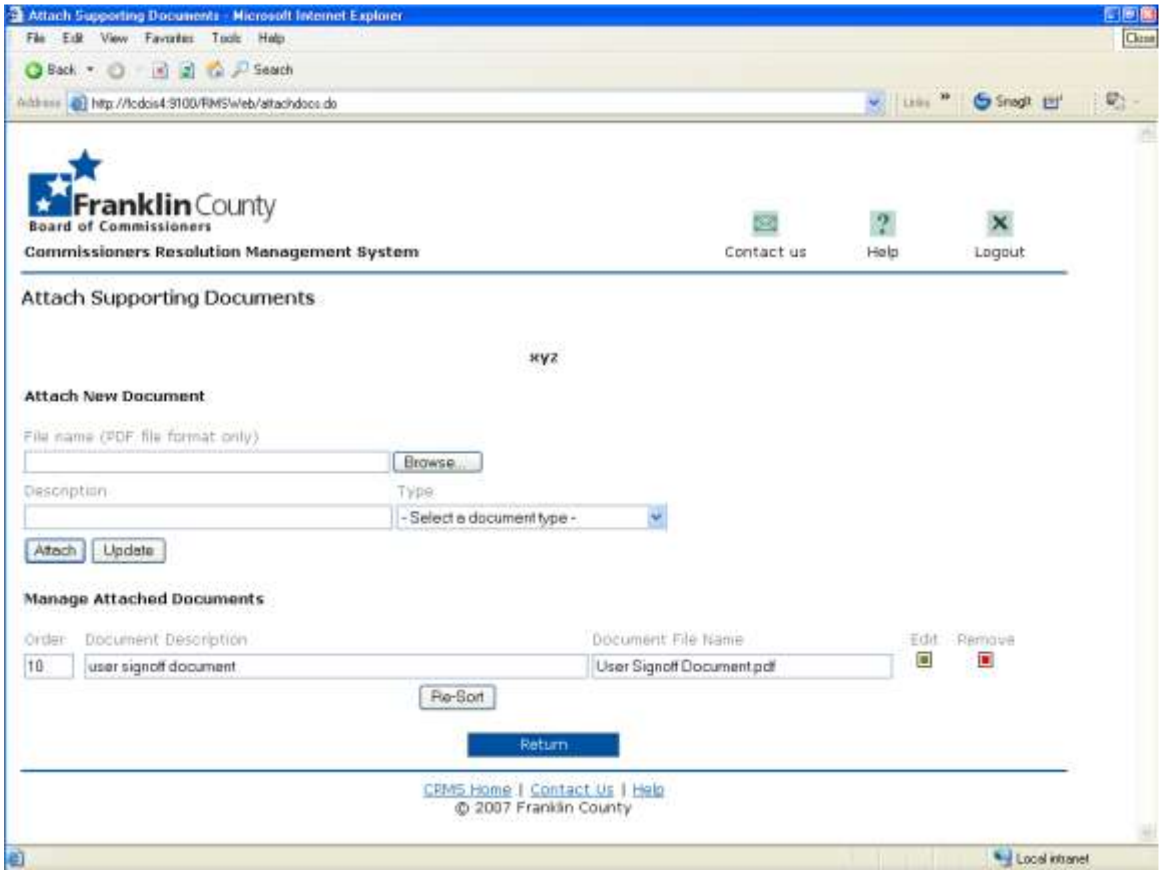


*Screen Showing Attached Document*

5. Repeat steps 2 through 5 until all documents have been attached

To re-sort the attached documents (change the order in which they appear), change the Order Number in the box to the left of the attachment so it falls above or below another attachment's number. For example, to move attachment #30 to a spot between #10 and #20, change #30 to #15; click "Re-Sort"; the list will be re-sorted, and new Order Numbers will appear to the left of the attachments.

To edit information in the description and/or type field of an attachment, click the green "Edit" button to the left of the attachment, then make changes to those fields and click "Update". The new description and type will be saved.

To remove an attachment, click the red "Remove" button at the end of the attachment; that attachment will be removed from the list.

To return to the Create/Edit Resolution screen, click "Return".

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# SEARCHING FOR RESOLUTIONS


*Resolution Search Screen*

Click “Search” on the Workspace screen to go to the Search screen.

Only resolutions that have been published are available to search on and used as a copy for a new resolution. Clicking on the Search button on the Administator’s Workspace will bring up a new screen to enter the search criteria into.

- A resolution that has been published is also available to use as a copy for a new resolution.
- If a resolution was pulled from an agenda it will not be available for searching.

A user can search for a resolution either by entering in keywords that will be found in the resolution, by the Resolution Number itself, agency name or the Resolution Date into the Keywords search box. Select the sort order in the Matching Resolutions section by either the resolution number order or in date order, click on the appropriate radio button. Click on Search and the results will appear below under the Matching Resolutions section.

**Key Word or Phase Searches:**
There are two types of queries: Single Terms and Phrases.

- A Single Term is a single word such as "test" or "hello".
- A Phrase is a group of words surrounded by double quotes such as "hello dolly".
- Multiple terms can be combined together with Boolean operators to form a more complex query (See Refine Searches).

**Formatting and Indexing**:
The following rules are applied when searching the database, and use them as a guideline(s) for your search criteria.

Do not include any of the following characters in your search criteria:

- + - && || ! ( ) { } [ ] ^ " ~ * ? : \
- To escape these character use the \ before the character. For example to search for (1+1):2 use the query: use \(1\+1\)\:2

## Refine Searches:

1. **Wildcard queries** - Allows for broader search results, characters take the place of any other character that is not known or specified can be prefixed and suffixed.
    1. To perform a single character wildcard search use the '?" symbol. Example: "te?t" will return "Text" and Test".
    2. To perform a multiple character wildcard search use the "**" symbol. Example: "test**" will return "test", "tests" and "tester".
2. **Fuzzy queries** - Searches for words with a form similar to the words entered. This is useful for finding misspelled words. It is used by adding ~ to its end, e.g. query *sarah~ thompson~* will give all different spellings and similar names to sarah thompson.
3. **Boolean or Logical Operators** - Are used to allow you to enter several words in a search.
    - AND (&) - Retrieves records in which all the entered words are present. The system considers the query "dog and cat" the same as "dog & cat". This query returns names that contain both the words "dog" and "cat" regardless of their order within the name.
    - OR (+) - Retrieves records in which at least one of the entered words is present. The query "dog or cat" returns all names that contain only the word "dog", only the word "cat" or both words "dog" and "cat" in the name.
    - NOT (!) - Retrieves records where only the first word entered is present, excludes documents that contain the term after NOT. The query "dog not cat" would return all names which have the word "dog" except those that also have the word "cat".
    - Prohibit (-) - Excludes records that contain the term after the "-". The query "Jakarta apache" – "Apache Lucene" will return all records with Jakarta but not Apache Lucene.
    - Grouping ( ) - Using parentheses to group key words or clauses. The query (Jakarta or apache) and website will result in documents where the name Jakarta or apache appears along with the work website.

## Search Criteria – Advanced Search


*Search – "Advanced Search"*

To narrow the search results by Agency,click on Open Advanced Search link. The Date Range and Agency selection become available. To include the date parameters in your search criteria click on the Date Range box and a calendar picker will appear, select the Begin and End date. To select one or all agencies scroll down and select the appropriate agency, click Search and the results will appear below under the Matching Resolution section.

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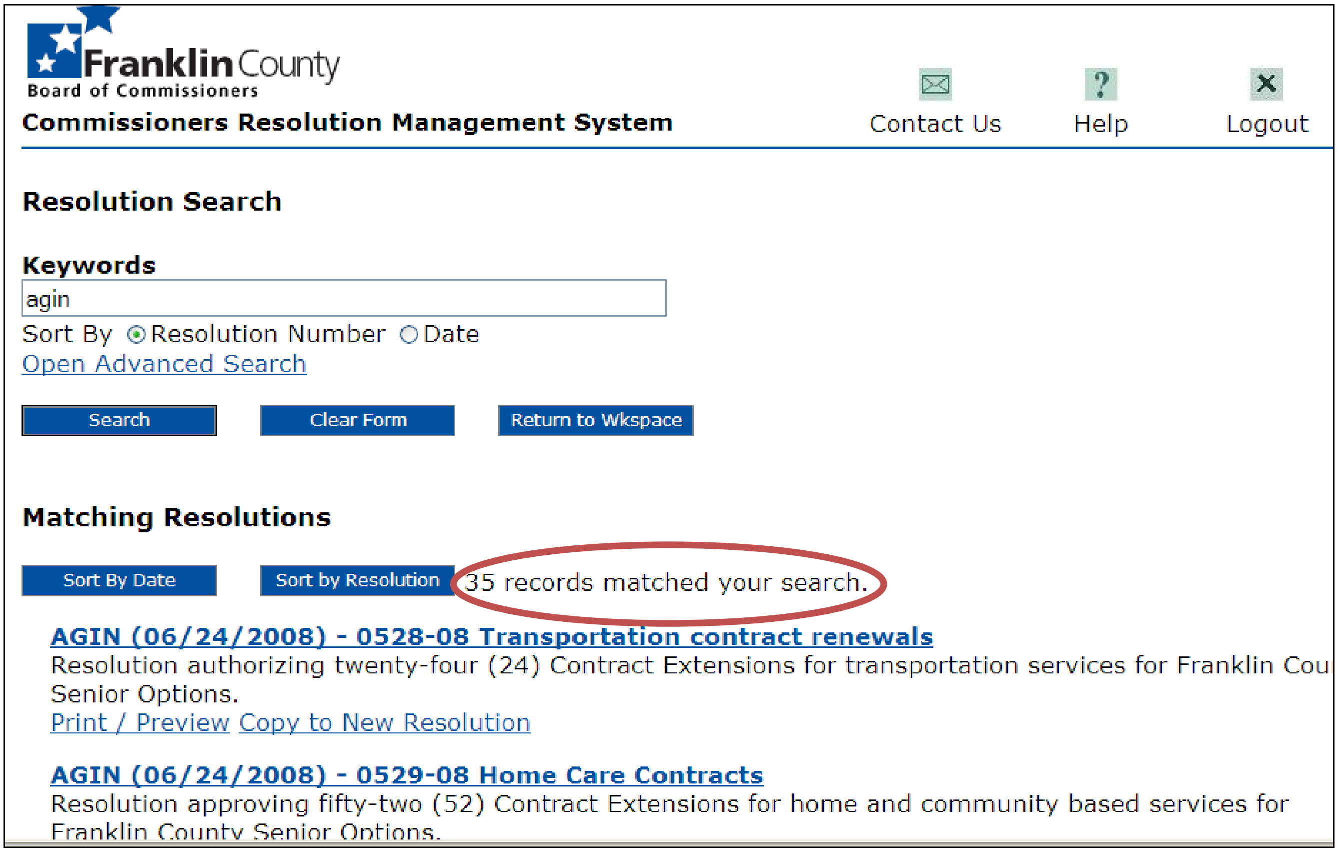
## Search – Results



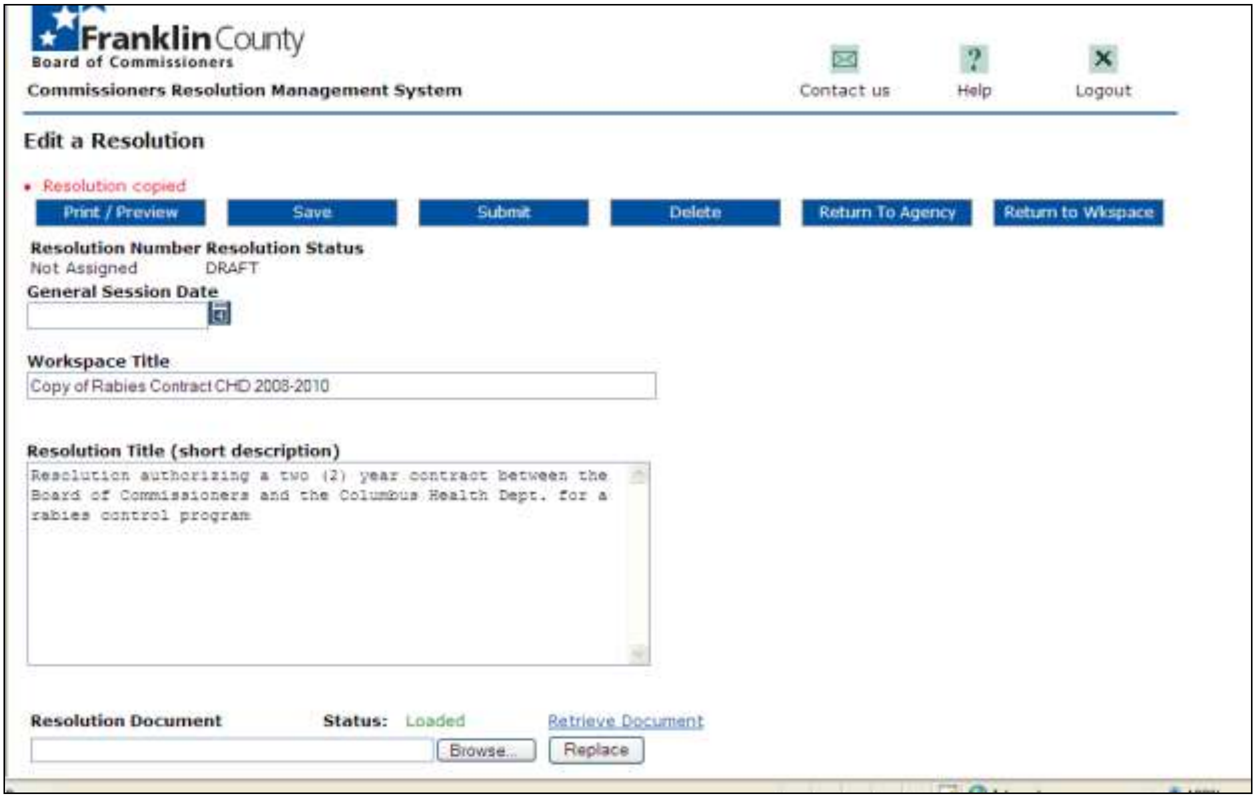

*Search – "Return Results"*

The results appear under the Matching Resolutions section of the screen. The number of records that match the search criteria is displayed next to the Sort by Resolution button.

Click the Print/Preview button to view or print the resolution. If a copy of the resolution is needed to use to help create a new resolution, click Copy to New Resolution. This will open the Create/Edit Resolution screen with the copy of the resolution.

The option to sort after the resolutions have been displayed in the Matching Resolution section, click on either; Sort by Date or Sort by Resolution button.

## Copy Resolution




*Search – "Copy"*

The Create/Edit Resolution screen will appear with the resolution attached. The wording "Resolution Copies" will appear in red at the top of the screen.

- The word "Copy" will appear in the title field, this will need changed.
- The General Session Date, and Agency Name will be blank.
- Attach new documenation. Click open the attached resolution and edit as needed, rename and save, the reattach. Proceed as a regular resolution.

**EDITING A RESOLUTION**

To edit a resolution, first either select the resolution from the Pending queue on the Workspace screen, or use the Search function to locate a resolution (see Searching for Resolutions – page 15). This will bring up the resolution in the Create a Resolution screen.

To edit information not contained in the Word document (*e.g.* fields on the screen such as Workspace Title, Agency, and Amount), make changes to the field(s) on the Create a Resolution screen, and click Save.

To edit information contained in the Word Document:

1. Click Retrieve Document. A File Download box displays
2. Click Save. A Save dialog box displays
3. Save the document to a drive on your PC where you can find it easily
4. A Download Complete box displays when you have finished saving the document. Click Open. The document displays in Microsoft Word
5. Make changes to the file
6. Save the document, and close Microsoft Word
7. In CRMS, click Browse. A Choose File box appears. Select the document you saved and click Open. The document path displays in the Resolution Document field
8. Click Replace. This replaces the original document with the edited version. The Working Copy status indicator should now read “loaded” in green

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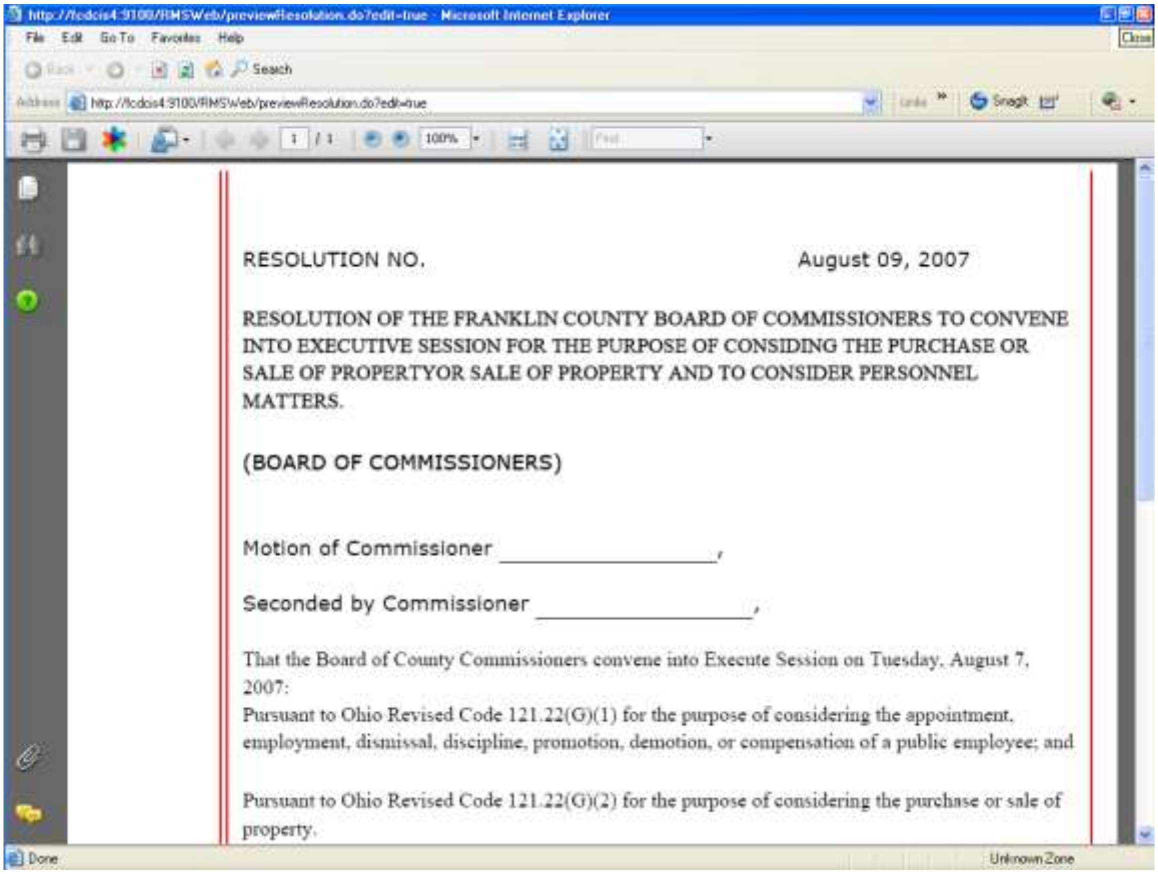
## PRINTING A RESOLUTION




*Print/Preview Screen*

Printing resolutions in the Pending Submission queue on the Agency Workspace screen:

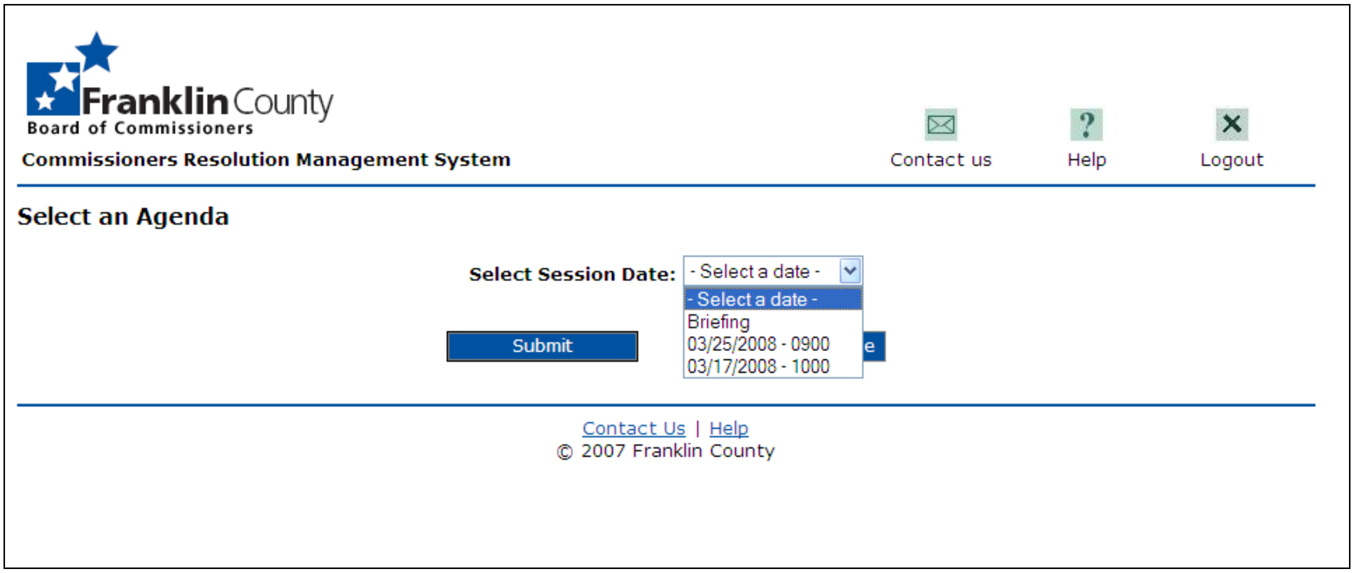
1. Click the Workspace Title of the resolution to be printed. This displays the Create a Resolution screen
2. Click Print/Preview. The Print Preview screen displays the resolution as it will be printed (PDF), with any attachments displayed on the side of the screen
3. Click on each attachment to open it for review and printing
4. Click the Print icon in the top left of the screen to print the resolution. The attachments will be listed in the left margin, and are also available for viewing and printing

Printing a resolution in the Submitted or Finalized queue:

1. Click the Workspace Title to open the Print/Preview screen.
2. Click the Print icon in the top left of the screen to print the resolution. The attachments will be listed in the left margin, and are available for viewing and printing.

Note: A resolution can be saved as a PDF file and Emailed if necessary.

## VIEWING AGENDA




*View Agenda "Select an Agenda" Screen*

From the Workspace a user can select an agenda which includes its resolutions with supporting documentation to preview and/or print. A user clicks on the View Agenda button on their Workspace, Select Agenda screen appears, users selects the last published Briefing Agenda or selects a date of a published General or Special Agenda listed in the drop down box.

The selected agenda, all resolutions and their supporting documentation will appear in PDF format. From here the user can either preview and/or print the agenda, resolutions and/or their support documentation.